

FACULTY SEARCH TRAINING GUIDE FOR COMMITTEE MANAGER

School of Medicine & Dentistry

Welcome to UR Faculty, our new comprehensive Faculty Information System! This training guide covers the Faculty Search module of UR Faculty, focusing on the role of an administrator.

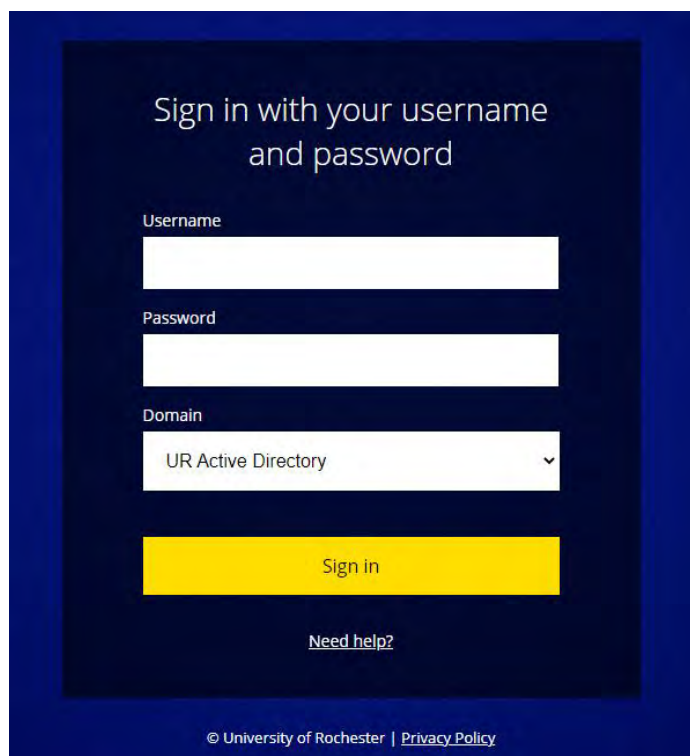
Note: You must be included the UR Faculty: Faculty Search database in order to access Faculty Search. If you are not or would like to request access on behalf of a new user, please send an email to URFacultyHelp@rochester.edu and include:

- User's full name
- Email address
- URID, if possible
- School/department
- Role (Administrator/Committee Manager/Evaluator)

For information on role definitions and permission levels, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/user-roles-in-interfolio-faculty-search

SIGN IN

- Access Interfolio at: https://iam-api.interfolio.com/users/sso_redirect?tenant_id=16224
- Fill out your username and password (SSO login credentials for University of Rochester) and select the appropriate domain
- Click on "Sign in"



Sign in with your username
and password

Username

Password

Domain
UR Active Directory ▼

Sign in

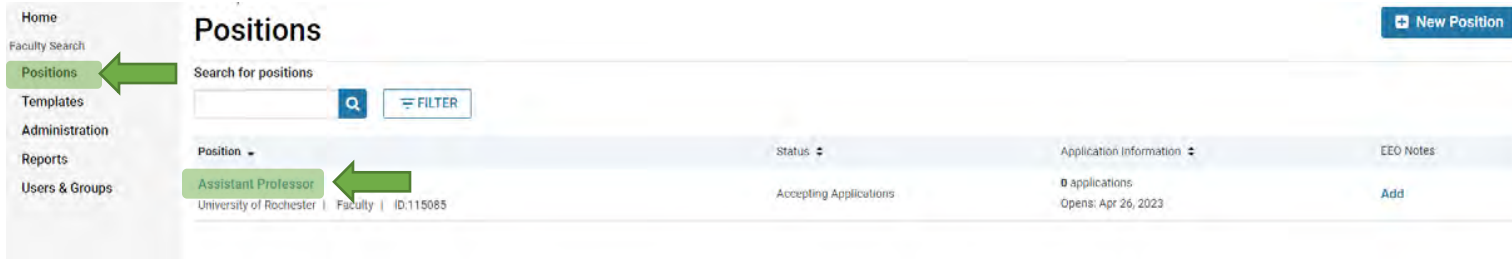
[Need help?](#)

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EDIT AN EXISTING POSITION

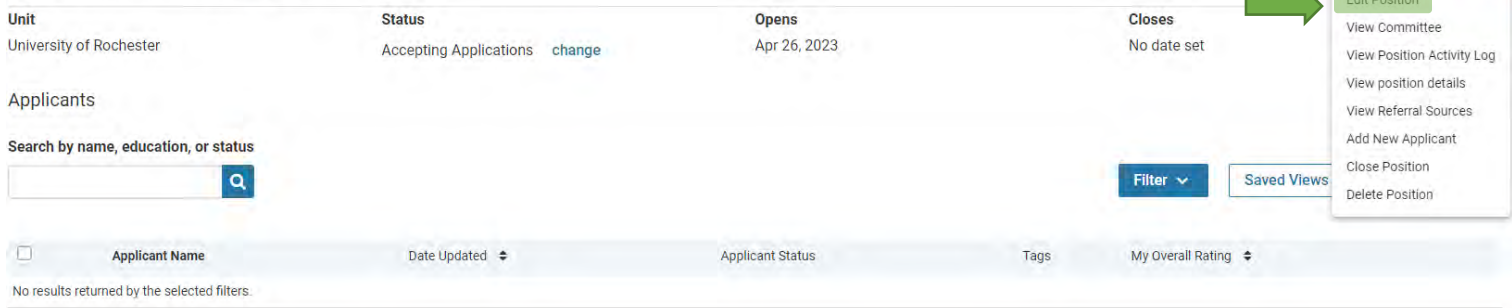
EDIT POSITION

- **Note:** After the position has been approved, the Office of Academic Affairs will receive email notifications for position edits.
- From the UR Faculty home screen, click on “Positions” on the left menu
- Click on the position from the list of positions displayed



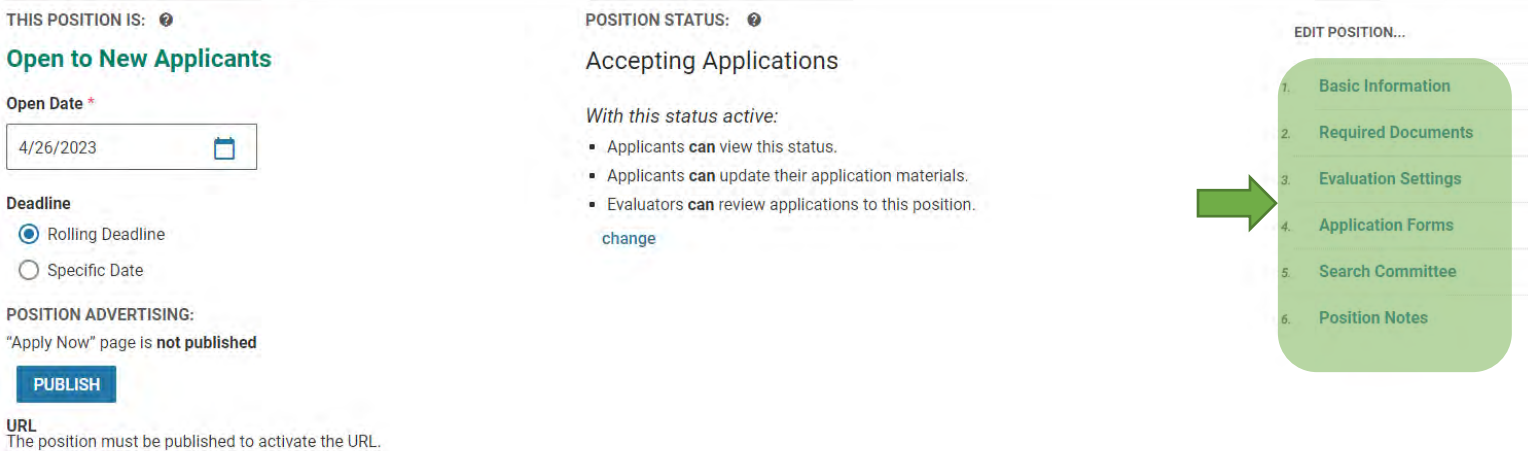
- Click on “Position Actions” at the top right corner and select “Edit Position”

Assistant Professor



- Under the “Edit Position” menu on the right side, select the section you want to edit.

Position Summary



For more information on editing an existing position, see Interfolio's help site: https://product-help.interfolio.com/en_US/creating-and-managing-positions/edit-an-existing-position

SETTING A USER'S PERMISSION LEVEL

- Administrators and Committee Managers can set the permission level of users in their unit and below. By default, users have the permission level of an Evaluator. If you are trying to add a user as a Committee Manager but do not see their name as a selectable option when creating/editing a search committee, you will need to assign that user a Committee Manager role.
- From the UR Faculty home page left side menu, click on "Users & Groups"

Home Interfolio Scholar Service Helpdesk Unavailable
Interfolio Scholar Services Helpdesk will be unavailable today, Tuesday, April 25th, from 3:30pm - 4:30pm ET. Please send us an email at help@interfolio.com or leave us a voicemail at (877) 997-8807 during this time, and we will get back to you as soon as possible.

Faculty Search
Positions
Templates
Administration
Reports
Users & Groups

My Tasks

0 Unread Tasks
0 Read Tasks

Looks like you're all caught up. Nice.









- Click on the pencil icon on the right side of the desired user's name.

Users, Units & Titles

Users Units Titles

Search for users

Download User list Add User

| User | Role & Unit | Additional Permissions | Actions |
|--|---|------------------------|---|
| Linda Anderson linda.anderson@rochester.edu | Administrator University of Rochester | - |  |
| Stephanie Arnold stephanie.arnold@rochester.edu | Administrator University of Rochester | - |  |
| Stephanie Arnold stephanie.arnold@rochester.edu | Administrator School of Medicine and Dentistry | - |  |
| Stephanie Arnold stephanie.arnold@rochester.edu | Administrator Office of the Provost | - |  |
| Stephanie Arnold stephanie.arnold@rochester.edu | Administrator College of Arts, Sciences & Engineering | - |  |
| Stephanie Arnold stephanie.arnold@rochester.edu | Administrator University of Rochester | - |  |
| Stephanie Arnold stephanie.arnold@rochester.edu | Administrator Simon Business School | - |  |
| Stephanie Arnold stephanie.arnold@rochester.edu | Administrator University of Rochester | - |  |

- Under “Permissions”, click on “+ Add Role”

Edit User ✕

First Name * Last Name *

Email *

Single Sign On
 If checked, this user will need to sign on using their institutional credentials.

Update **Cancel**

Permissions SSO Identifier

Role
A user's role determines their capabilities in the program. [Learn more about User Roles.](#)

| Role | Unit | Actions |
|---------------|-------------------------|---------|
| Administrator | University of Rochester | Remove |

+ Add Role ←

Title
A title can be assigned to the unit of the administrator's current role or a unit below. [Learn more about titles.](#)

| Title | Unit | Actions |
|-------|------|---------|
|-------|------|---------|

+ Add Title

Options ▾

- Select your unit from the drop down list and select the appropriate permission level under Role
- Click “Save”

Edit User ✕

First Name * Last Name *

Email *

Single Sign On
 If checked, this user will need to sign on using their institutional credentials.

Update **Cancel**

Permissions SSO Identifier

Role
A user's role determines their capabilities in the program. [Learn more about User Roles.](#)

Unit *
Select a unit ←

Role *
Committee Manager ←

Save **Cancel**

Options ▾

- **Note:** if you are trying to add someone to your search committee who is not in the UR Faculty database at all, please do not add a new user yourself. Please contact URFacultyHelp@rochester.edu so that the UR Faculty team can set up the new user with the correct security settings. Once they are in the database as a user, you can add them to your search committee.

For more information on changing a user's role, see Interfolio's help site: https://product-help.interfolio.com/en_US/managing-users/change-a-users-role-or-delete-a-user-in-faculty-search

MANAGE A SEARCH

CHANGE POSITION STATUS

- From the UR Faculty home screen, click on "Positions" on the left menu
- Click on the position from the list of positions displayed

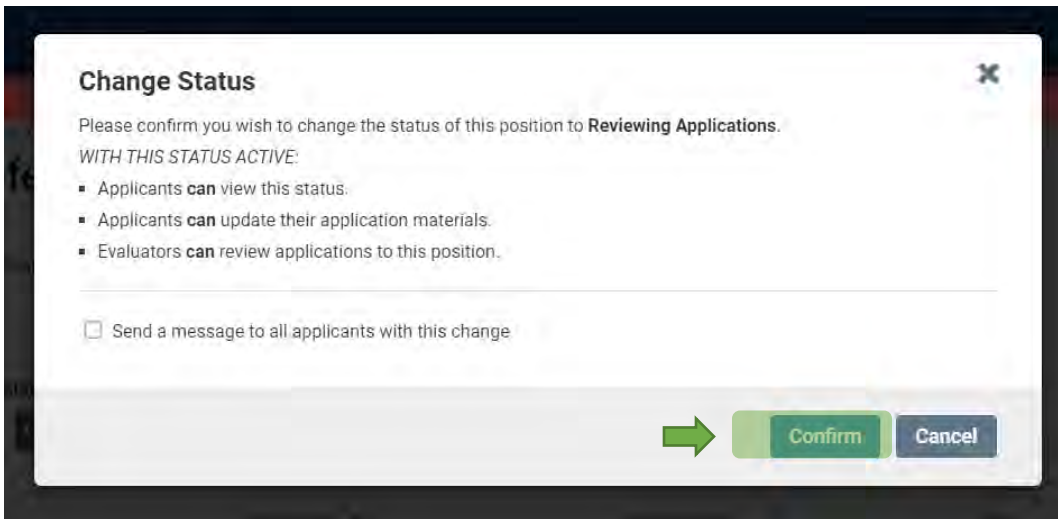
The screenshot shows the 'Positions' page in Interfolio. On the left, a navigation menu includes 'Home', 'Faculty Search', 'Positions', 'Templates', 'Administration', 'Reports', and 'Users & Groups'. The 'Positions' item is highlighted with a green arrow. The main area displays a table with columns for 'Position', 'Status', 'Application Information', and 'EEO Notes'. The first row is highlighted with a green arrow, showing 'Assistant Professor' with a status of 'Accepting Applications' and 'Opens: Apr 26, 2023'. A 'New Position' button is visible in the top right corner.

- You are now on the position profile page. Under Status and next to the current position status, click "change". When you choose a new position status, a pop-up will display what that status means for current applicants and evaluators. The position status does not affect whether new candidates can apply to the position or not (use open date/unpublish position/close position to control that).

Assistant Professor

The screenshot shows the 'Assistant Professor' position profile page. The 'Status' field is set to 'n/a' and has a 'change' button next to it, highlighted with a green arrow. A dropdown menu is open, showing various status options. The 'Reviewing Applications' option is highlighted with a green arrow. The page also shows 'Applicants' with a search bar and a table listing one applicant, 'Joseph Baker', with a 'Complete' status. The 'Position Actions' button is in the top right corner.

- Select the desired position status and click "Confirm" on the pop-up window.



USE APPLICATION STATUS

- Use application statuses to track the progress of applications. Application statuses can also be filtered by in Faculty Search reports, which might be useful for you.
- On the position profile page, you will see the pool of applicants who have applied for the position. Click on an applicant's name to enter their application profile page. Under Status, click "change". When you choose a new application status, a pop-up will display what that status means for the applicant.
- Select the desired application status and click "save" on the pop-up window.

Joseph Baker

Education Information

M.A., Interfolio University

Status

n/a **Change** ←

Dis **Under Review** Add

Pre-screen

Withdrawn

Interview

Longlist

Shortlist

Form:

Strong Candidate

Title:

Univ Offer Pending Application Form

13 Qu Offer Accepted

Send to myURHR

Decline

Remove Status

Tags

+ Add

FILTER APPLICANT POOL

- The list of applications can be filtered by data points including highest degree earned, application status, tags, completion status, ratings, or form responses
- Click “Filter” and apply desired filters
- The filtered view can be saved by clicking “Save” or cleared by clicking “Clear Filters”

Assistant Professor

Position Actions ▾

| | | | |
|---|---|-----------------------|-----------------------|
| Unit University of Rochester FS/LM Test Site | Status Reviewing Applications change | Opens Apr 26, 2023 | Closes No date set |
|---|---|-----------------------|-----------------------|

Applicants

Search by name, education, or status

M.A. - Master of Arts

HIGHEST DEGREE EARNED: M.A. - Master of Arts

APPLICATION STATUS: No choices available.

TAGS: No choices available.

PROGRESS: Complete

RATINGS: My Rating

☆☆☆☆ No Rating

ARCHIVED: Yes No

USE TAGS TO MARK & SORT APPLICATIONS

- Tags are used to help sort, categorize, and quickly identify applications. Tags are visible to other committee members.
- On the applicant’s profile under “Tags” click “+ Add” to add a tag.
- Alternatively, tags can also be added in bulk from the position page.

Jane Doe

Actions ▾

Education Information
M.A., University of Rochester

Status
n/a [Change](#)

Disposition Code [+ Add](#)

Tags

Application

| Title | Date | Actions |
|--------------------------------|-------------|----------|
| C.V. c.v. | May 1, 2023 | Download |
| Cover Letter Uncategorized | May 9, 2023 | Download |
| Creative Work Creative Work | May 1, 2023 | Download |

Forms
University Base Application Form
20 Questions

EMAIL APPLICANT(S)

- From the position profile, select the checkbox next to the desired applicant(s).
- Names of applicants who applied for the position will appear on this position page. Select the checkbox next to the desired applicant(s).
- A red horizontal menu bar will appear. Click on “Email”

Assistant Professor

Position Actions ▾

Unit: University of Rochester FS/LM Test Site | Status: Reviewing Applications [change](#) | Opens: Apr 26, 2023 | Closes: No date set

Applicants

Search by name, education, or status

Filter ▾ | Saved Views ▾ | COLUMNS

1 of 1 Applicants Shown.

READ | EMAIL | STATUS ▾ | TAG ▾ | + DISPOSITION CODE | DOWNLOAD | ARCHIVE

| Applicant Name | Date Updated | Applicant Status | Tags | My Overall Rating |
|--|-----------------------|------------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester Complete | 05/01/23 01:16 PM EDT | | + | ☆☆☆☆☆ |

- Fill out the information on the pop-up window and click “Send”.
- Alternatively, to email a singular applicant, you can also click on the applicant’s name to see the applicant’s profile. Then click “Actions” from the top right menu, and click “Email applicant”.

Jane Doe

Education Information
M.A., University of Rochester

Status
n/a [Change](#)

Disposition Code [+](#) Add

Tags
[+](#) Add

Application

Actions ▾

- Share application
- Email applicant
- Download Application PDF
- Download Application ZIP
- Mark application incomplete
- Request recommendation
- Send to Appointment Management (a...)

[Complete](#) [+ Add File](#) [Read](#)

REQUEST LETTER OF RECOMMENDATION ON BEHALF OF AN APPLICANT

- From the applicant's profile, click "Actions" from the top right menu, and click "Request recommendation"

Jane Doe

Education Information

M.A., University of Rochester

Status

n/a [Change](#)

Disposition Code [+ Add](#)

Tags

[+](#) Add

Actions 

- Share application
- Email applicant
- Download Application PDF
- Download Application ZIP
- Mark application incomplete
- Request recommendation
- Send to Appointment Management (a...

[Complete](#)

[+ Add File](#)

[Read](#)

Application

Documents

| Title | Date | Actions |
|---------------|-------------|--------------------------|
| C.V. | May 1, 2023 | Download |
| C.V. | | |
| Cover Letter | May 1, 2023 | Download |
| Cover Letter | | |
| Creative Work | May 1, 2023 | Download |
| Creative Work | | |

Forms


| Title |
|----------------------------------|
| University Base Application Form |
| 20 Questions |

- Fill out the recommendation request page and click "Send"

ARCHIVE OR UNARCHIVE AN APPLICATION

- During the search process, you may want to archive specific applications so that it is no longer displayed in the applicant pool (unless you change the filters). For example, if an applicant is not moving on to the next stage of the recruitment process, you may choose to archive their application so it is no longer visible to Evaluators.
- From the position profile, select the checkbox next to the desired applicant(s).
- Select the checkbox next to the desired applicant(s)' name.
- A red horizontal menu bar will appear. Click on "Archive"

Assistant Professor

Position Actions 

| Unit | Status | Opens | Closes |
|---|---|--------------|-------------|
| University of Rochester FS/LM Test Site | Reviewing Applications change | Apr 26, 2023 | No date set |

Applicants

Search by name, education, or status

Filter 

Saved Views 

 COLUMNS

1 of 1 Applicants Shown.

[READ](#) [EMAIL](#) [STATUS](#) [TAG](#) [+ DISPOSITION CODE](#) [DOWNLOAD](#) [ARCHIVE](#)

| Applicant Name | Date Updated | Applicant Status | Tags | My Overall Rating |
|--|-----------------------|------------------|-------------------|-------------------|
| <input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester Complete | 05/01/23 01:16 PM EDT | | + | ☆☆☆☆ |

- To unarchive, click the Filter button above the list of applicants. Select “Yes” under “Archived” to filter the list to display only archived positions.
- Select the checkbox next to the desired applicant.
- On the red menu bar that appears, select “unarchive”

Applicants

Search by name, education, or status

Archived Save Clear Filters

Saved Views COLUMNS

HIGHEST DEGREE EARNED: M.A. - Master of Arts

APPLICATION STATUS: No choices available.

TAGS: strong publications

PROGRESS: Complete Incomplete

RATINGS: My Rating No Rating

ARCHIVED: Yes No

2 Applicants Shown.

STATUS TAG + DISPOSITION CODE DOWNLOAD UNARCHIVE

| Applicant Name | Date Updated | Applicant Status | Tags | My Overall Rating |
|---|-----------------------|------------------|--|-------------------|
| <input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester <input type="button" value="Complete"/> | 05/01/23 01:16 PM EDT | | <input 263="" 56="" 617="" 634"="" data-label="Section-Header" type="button" value="+</input></td> <td>☆☆☆☆</td> </tr> </tbody> </table> </div> <div data-bbox="/> <h3>APPLY DISPOSITION CODES</h3> | |

- Once an applicant has been selected for hire and you are getting ready to close out the position, you will first apply disposition codes to all the applicants who have not been selected, including the applications you may have archived (change the filters to display archived applications).
- On the position profile page, select the checkbox next to the desired applicant(s) name.
- A red horizontal menu bar will appear. Click on “Disposition Code”

Assistant Professor

Position Actions

| | | | |
|--|--|------------------------------|------------------------------|
| Unit University of Rochester FS/LM Test Site | Status Reviewing Applications change | Opens Apr 26, 2023 | Closes No date set |
|--|--|------------------------------|------------------------------|

Applicants

Search by name, education, or status

1 of 1 Applicants Shown.

| Applicant Name | Date Updated | Applicant Status | Tags | My Overall Rating |
|--|-----------------------|------------------|------------------------------------|-------------------|
| <input checked="" type="checkbox"/> Jane Doe M.A. - Master of Arts, University of Rochester Complete | 05/01/23 01:16 PM EDT | | + DISPOSITION CODE | ☆☆☆☆ |

- **Select the desired disposition code and click “Apply”**

Apply Disposition Code

- Candidate Withdrawn
- Candidate Withdrawn: Accepted Another Job
- Candidate Withdrawn: Location
- Candidate Withdrawn: No Longer Interested
- Candidate Withdrawn: Salary
- Candidate Withdrawn: Schedule
- Candidate Withdrawn: Unable to Contact
- Ineligible: Applied After Job Filled
- Ineligible: Duplicate Application
- Ineligible: Incomplete Application
- Ineligible: Not Authorized to Work in U.S.
- Not Selected: Failed Prescreening
- Not Selected: Lacks Minimum Qualifications
- Not Selected: Lacks Preferred Qualifications
- Not Selected: Less competitive based on education
- Not Selected: Less competitive based on field of study
- Not Selected: Less competitive based on work experience
- Not Selected: No Call/No Show for Interview
- Not Selected: Offer Rescinded
- Not Selected: Poor Interview
- Not Selected: Poor References

[APPLY](#) [REMOVE DISPOSITION CODE](#)

- **Alternatively, to apply a disposition code to a singular applicant, you can also click on the applicant’s name to see the applicant’s profile. Then next to Disposition Code, click “+ Add”**

CLOSE POSITION

- Please follow the University of Rochester Posting Requirements guidelines for your school regarding the number of days a position must stay open.
- Please note that positions with applications attached to them can only be closed, not deleted.
- From the position page, click on “Position Actions” from the top right drop down menu and click “Close Position.”

Assistant Professor

Unit: University of Rochester FS/LM Test Site | Status: Reviewing Applications | Opens: Apr 26, 2023 | Closes: No date set

Applicants

Search by name, education, or status

1 of 1 Applicants Shown.

| Applicant Name | Date Updated | Applicant Status | Tags | My Overall Rating |
|---|-----------------------|------------------|------|-------------------|
| Jane Doe M.A. - Master of Arts, University of Rochester Complete | 05/01/23 01:16 PM EDT | | | ☆☆☆☆ |

- Indicate if an applicant has been selected.
- If “yes” click on “+ Add Applicant”, select the desired applicant, and click “Close Position”
- If “no” add a note to document why no selection was made, and click “Close Position”

Closing Position

Was an applicant selected?

Yes

No

Select Applicant(s)

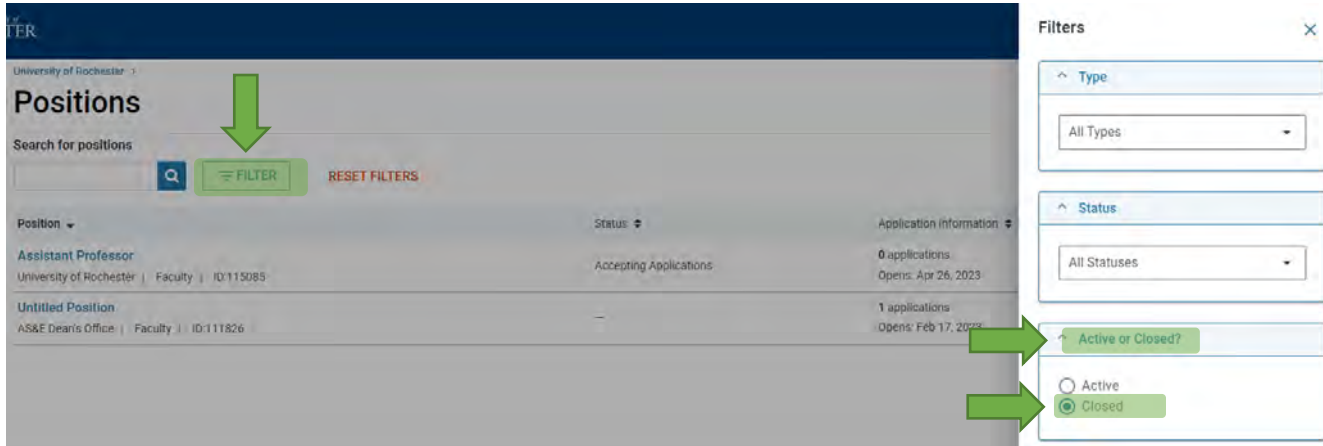
You must select at least one applicant to continue.

Add Applicant

- The process of having your selected applicant approved for hire starts by closing the position. This will trigger a notification to the Office of Academic Affairs to approve or reject the hire.
- If the corresponding position in myURHR is closed, the position status of the UR Faculty position will automatically change to “Closed in myURHR”. This is only a position status change for visibility purposes, and does not actually close the position. Closing a position in UR Faculty will need to be done manually by clicking on Position Actions.

REOPEN A CLOSED POSITION

- If for some reason you need to reopen a closed position, click on “Filter” and in the pop up window, select “Closed” in the “Active or Closed?” section.



- Click on the desired position to reopen.
- Click on “Position Actions” in the top right corner and click “Open Position”

Assistant Professor

This position is closed. To receive new applications for the position, or to allow committee members to review previous applicants, you must reopen the position. [LEARN MORE ABOUT F](#)

| Unit | Status | Opens | Closes |
|-------------------------|--|--------------|-------------|
| University of Rochester | Accepting Applications (Closed) change | Apr 26, 2023 | No date set |

Applicants

Search by name, education, or status

Filter Saved Views COLUMNS

Applicant Name Date Updated Applicant Status Tags My Overall Rating

No results returned by the selected filters.

Position Actions

- Edit Position
- View Committee
- View Position Activity Log
- View position details
- View Referral Sources
- Add New Applicant
- Open Position**
- Delete Position

For more information on managing a search, see Interfolio’s help site: https://product-help.interfolio.com/en_US/creating-and-managing-applications

Click here for an in-depth training course on Faculty Search for Administrators: <https://rise.articulate.com/share/W-GxsP51z-YF0IFRD2r1GbTFIMYyaTma#/>

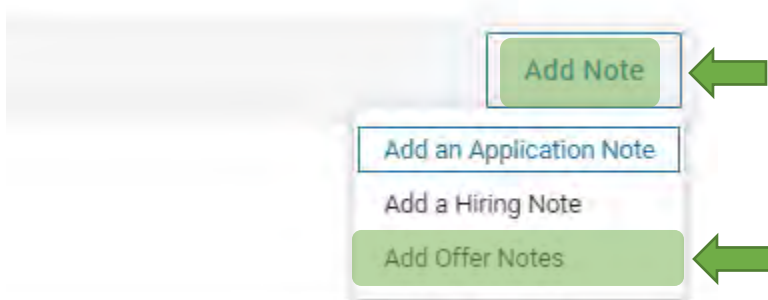
SENDING A HIRE TO MYURHR

- An integration has been set up to send a hire directly from UR Faculty to myURHR. There, they will be placed into the position that was initially created to kick off the recruitment process. If the hire will be using a different job code from what was entered into the myURHR position, you will need to first update the myURHR position to reflect this.
- Enter the applicant's profile. You can do this even if the position has been closed. (To find a closed position, change the filters on the Positions page to display closed positions).
- You will need to indicate which business process should be used in myURHR. Scroll down to the bottom of the applicant's profile and click on "Add Note", then select "Add Offer Note". Enter one of the following business processes (BPs) exactly as it appears here:

BP: new hire

BP: rehire

BP: change job



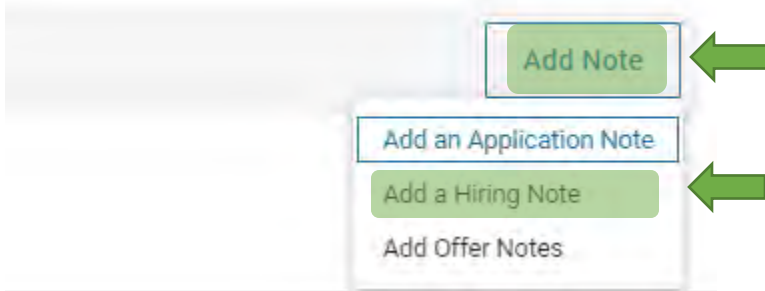
Offer Notes

Add a note to provide clarification about this applicant to your committee. Notes can only be created by Committee Managers and Administrators, but are visible to all members of this committee.

BP: new hire

Save Cancel

- If the hire is already affiliated with University of Rochester and has a URID, it will need to be indicated. Click on “Add Note” again and select “Hiring Note”. There, enter only the 8 digit URID.



Hiring Note

Add a note to provide clarification about this applicant to your committee. Notes can only be created by Committee Managers and Administrators, but are visible to all members of this committee.

✓ Save Cancel

- Finally, update the application status to send the hire to myURHR. On the applicant’s profile under Status, click on “Change”. Note that the application status is different from the position status; the application status is found on the individual applicant’s profile. Select the status “Send to myURHR”. This triggers the integration to send the hire to myURHR.

Jane Doe

Education Information

M.A., University of Rochester

Status

Send to myURHR

Change



Disposition Code

Send to myURHR



Application

Documents

Title ^

C.V.

C.V.

Cover Letter

Uncategorized

Creative Work

Creative Work

Under Review

Pre-screen

Withdrawn

Interview

Longlist

Shortlist

Strong Candidate

Offer Pending

Offer Accepted

Hired

Decline

Remove Status

- **WORKDAY STEP:** Continue with onboarding your hire in Workday following myURHR instructions. Note: the hire integration from UR Faculty to myURHR runs once an hour.

Click here for an in-depth training course on Faculty Search for Committee Managers:
<https://rise.articulate.com/share/zkESWoStzmxsj8TgJzvOXrRfCbQXmvG9#/>